

A New Look at the Progress Log...

A place to call home in an electronic record



# Presentation Notes

- Created by Christal Davis, SC DHEC
  - Progress Log PPT 1.0
    - PE Version 4.2
      - Feb 19, 2009

# There's no place like... SC PE Progress Log!

Create Activity Add S

Action Plan  
Allergy  
Appointment  
Diagnosis  
Discharge  
Drug  
Graphs HIV  
Group Session  
Hospitalization  
Lab Panel  
Letter  
Program Enrollment Housing  
Progress Log  
Referral  
Report  
Service Provided  
Service Request  
Substance Use  
Symptom  
Test Result  
Treatment History  
Vaccination  
Vital Signs

- Progress Log Components
  - Main
  - Goals Addressed
  - Care Actions
  - Applications
  - Services provided
  - Referrals (Not in Progress Log)



# Main = Documentation

Who?



What?

When?

Where?

What was discussed?

Main	Goals Addressed	Care Actions	Applications	Services Provided
Status	*	In Progress		
Provider	*	Christal Davis		
Date	*	Thursday February 19, 2009		
Start Time	*	2:37 PM		
Minutes	*	0		
Contact Category	*			
Contact Type	*			
Contact Flag	*			
Funding Source	*	Ryan White		
Brief Description	*			
Full Description				

## SC Progress Log FAQ...

- What do I put in fields like minutes and contact type? Or what counts as a visit?

Click this link to access the “SC CM Documentation for PE”

<http://www.scdhec.gov/health/disease/stdhiv/rwpartb.htm>

(Appendix 1)

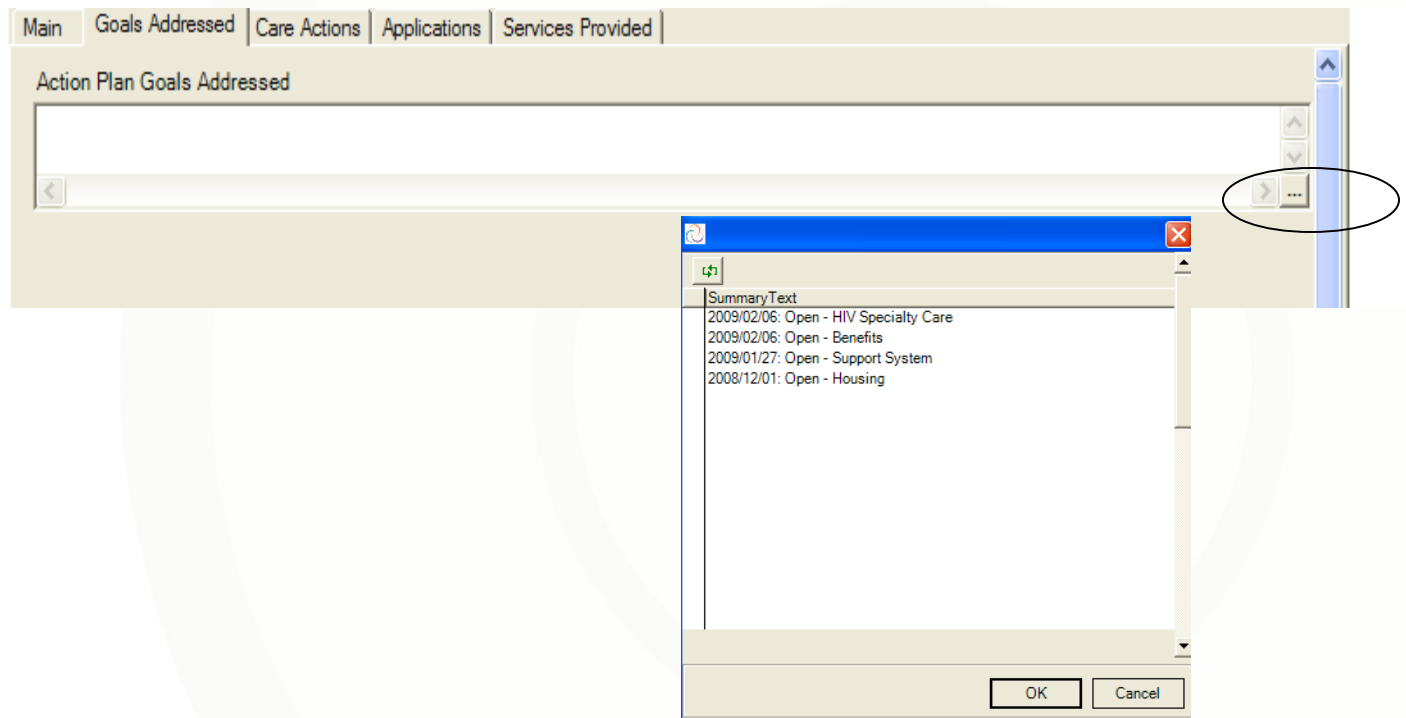
- What do these Progress Log categories mean?

Click this link for the “Ryan White Services Definitions”.

<http://www.scdhec.gov/health/disease/stdhiv/rwpartb.htm>

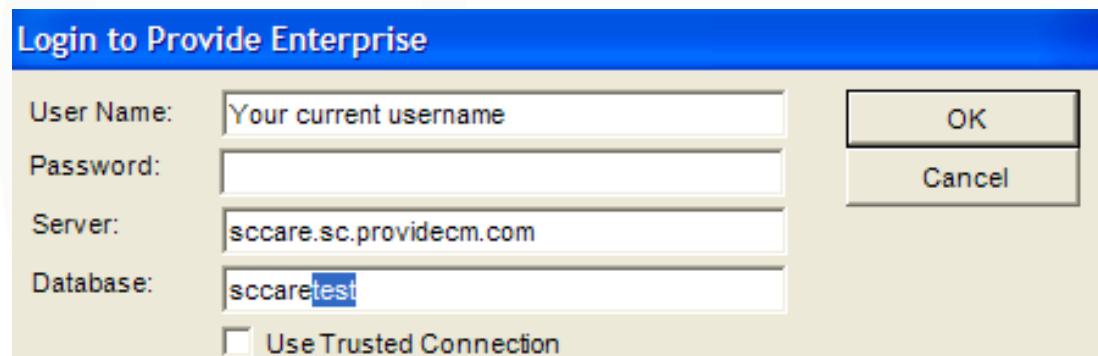
# After Main, Goals Addressed?

- Captures management of client goals.
- Demonstrates that Progress Log was in continuation of the Action Plan.



# SC PE Action Plan Update:

- Upcoming Action Plan design is available for viewing in the PE Test Database.
- (Estimated release date: March 2009).
- Check it out!!! Simply Log in to PE as you usually do... just change one thing...and REMEMBER to change it back!!



Login to Provide Enterprise

User Name:

Password:

Server:

Database:

☐ Use Trusted Connection

# Care Actions are ...

## Requirements of Service Categories...

- Care Actions are usually things you can touch.
  - Assessments [Forms]
  - Reassessments [Forms]
  - Tools HE/RR [Condoms]
- Soon you will be able to simply look for the requirements of each service you provided in the encounter.
- For example, Housing Case Management [HOPWA], Medical Case Management, Risk Reduction





# Upcoming improvements to Care Actions

## Care Actions Completed

- ☐ Action Plan Established
- ☐ Action Plan Established - HERR
- ☐ Action Plan Established - HOPWA
- ☐ Action Plan Review
- ☐ Action Plan Review - HOPWA
- ☐ Adherence Tools
- ☐ Application - Housing
- ☐ Application - Special Needs Bus Pass
- ☐ Assessment - Career Services
- ☐ Assessment - Initial - Health
- ☐ Assessment - Initial - Housing Needs
- ☐ Assessment - Initial - Mental Health
- ☐ Assessment - Initial - Risk Reduction
- ☐ Assessment - Initial - Service Needs
- ☐ Assessment - Mental Health
- ☐ Assessment - Reassess - Health
- ☐ Assessment - Reassess - Housing Needs
- ☐ Assessment - Reassess - Mental Health
- ☐ Assessment - Reassess - Risk Reduction
- ☐ Assessment - Reassess - Service Needs
- ☐ Brochures - Informational Material
- ☐ Dental Assessment
- ☐ Education Follow Up
- ☐ Emotional Support

- ☐ Dental Assessment
- ☐ Education Follow Up
- ☐ Emotional Support
- ☐ Employment Follow Up
- ☐ Follow-up Survey
- ☐ HIV Knowledge Test
- ☐ HOPWA 90-day Update Completed
- ☐ HOPWA 90-day Update Initiated
- ☐ Literature
- ☐ Safe Sex Practices Discussed
- ☐ Smoking Cessation Counseling
- ☐ Substance Abuse Screening
- ☐ Tools - HERR

- Reduce number of things in the screen.
- Re-organize by what service requires each Care Action.
  - Establish a form number system.
- Visit our library of forms on <http://www.scdhec.gov/health/disease/stdhiv/rwpartb.htm>

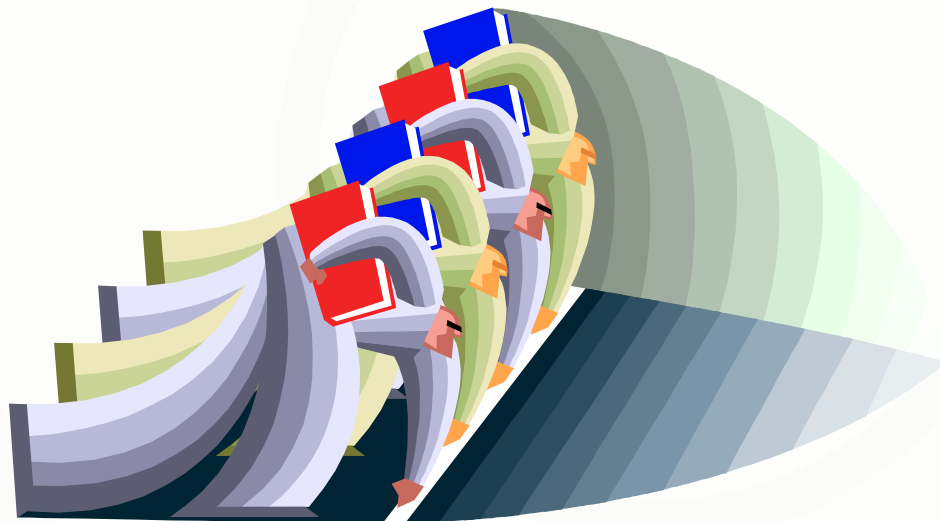
# Services Provided

- List of eligible activities/services under each funding source.
- Captures: Units of Measure, Funding Source for service.
- (PE Tip): Be sure to click away after entering units or the data may not save.)
- Not sure what is “Core vs. Support Services”? Click this link to print a checklist.

<http://www.scdhec.gov/health/disease/stdhiv/rwpartb.htm>

# Use Referrals to keep track of you keeping track...

- Click “Create Activity” to Create a Referral.
- Every time you use a service “Connection to...” or Refer to another agency
- Referral improvements coming soon.



# Group Session

- Use this for Non-Mental Health and Non-substance abuse group sessions.
- These are typically peer or staff led support groups.

The screenshot displays the 'Group Session' form within the ACCESS Network Inc. Case Management software. The window title bar includes 'File', 'Find', 'View', 'Actions', 'Tools', 'Reports', 'Windows', and 'Help'. Below the title bar, there are buttons for 'Close', 'Save', and 'Save And Create Another'. The form header shows 'Group Session : Christal Fake ()' and 'ACCESS Network Inc. - Case Management : Christal Davis/STDHIV/DHEC/SCGOV [02/19/2009]'. The form itself has a tab labeled 'Group Session' and contains several fields with dropdown menus and text boxes. The fields are: Group Name (Mixed Gender Group), Group Category (Psychosocial Support Services), Group Type (Peer Lead), Funding Source (Ryan White), Group Location (ASO/Consortium Office), Group Leader (Christal Davis), Group Date, Length of Session (Minutes), Cost of Session, and Group Comments.

Field	Value
Group Name	Mixed Gender Group
Group Category	Psychosocial Support Services
Group Type	Peer Lead
Funding Source	Ryan White
Group Location	ASO/Consortium Office
Group Leader	Christal Davis
Group Date	
Length of Session (Minutes)	
Cost of Session	
Group Comments	

# New feature in PE.

## Problem/challenge:

- I want to use Care Actions and Applications, but I don't use a progress log.
- or
- I want to create numerous Care Actions and applications.

## Solution:

- You can now create a Care Action or Application without creating a Progress Log.  
Have your agency contact the GTI Helpdesk at "Provide Help/GTI". Ask to have this feature enabled.